

Jorge Gray

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SUMMARY

Mid market implementation specialist with eight years delivering complex **B2B SaaS** onboarding programs for growing customer portfolios. Leads end to end deployments across **scope definition, shared configuration**, relational data, conditional logic, analytics, change management, customer enablement, and launch readiness. Manages about 15 concurrent implementations across four to eight week delivery cycles, keeping milestones, dependencies, ownership, and **success expectations** visible. Technical product fluency supports routine configuration decisions without separate technical resources, while clear coaching helps administrators and business users adopt practical workflows. Uses implementation metrics, customer feedback, adoption signals, and recurring issue patterns to improve delivery processes and time to value. Trusted by Customer Success, Sales, Product, Engineering, and Operations partners for thoughtful communication, critical thinking, and dependable execution in remote environments.

EXPERIENCE

Senior Implementation Specialist

January 2024 - Present

SummitCloud Solutions

Denver, CO

Leads about 15 concurrent mid market SaaS implementations across four to eight week programs. Owns customer planning, shared configuration, data relationships, analytics, change activities, launch readiness, and cross functional execution while improving scalable delivery practices.

- Led 15 concurrent SaaS launches using milestone plans, improving visibility across customer **dependencies**.
- Configured multi module workflows with **relational data** and **conditional logic**, resolving routine design questions directly.
- Ran discovery sessions that translated operating needs into scoped tasks, owners, and launch criteria.
- Guided administrator change activities through workflow reviews, practical coaching, and adoption focused recommendations.
- Used **adoption** signals and recurring questions to standardize implementation guidance across active customer programs.
- Coordinated **Customer Success**, Sales, Product, **Engineering**, and Operations decisions, keeping urgent launches moving.

Implementation Consultant

May 2021 - December 2023

Canyon Ridge Software

Phoenix, AZ

Delivered multi module **B2B SaaS** onboarding from kickoff through configuration validation, training, and production launch. Balanced **customer needs** with maintainable workflows, managed competing milestones, and converted recurring delivery lessons into stronger templates and handoffs.

- Delivered multi module **onboarding** plans from kickoff through validation, training, and production launch.
- Mapped customer processes to configurable **workflows** using relational concepts and conditional rules for maintainable solutions.
- Managed simultaneous projects through milestone reviews, exposing risks before delivery expectations became threatened.
- Facilitated change readiness sessions that converted unfamiliar system behavior into practical operating procedures.
- Analyzed cycle data and configuration issues, refining discovery templates and internal handoffs.
- Shared reproducible customer themes with **Product** and Engineering, separating configuration needs from product investment.

Implementation Coordinator

October 2018 - April 2021

FrontRange SaaS Services

Boulder, CO

Coordinated **customer onboarding** operations across a growing SaaS portfolio under senior consultant guidance. Built hands on capability in configuration, data relationships, analytics, rule based workflows, customer education, milestone tracking, and remote delivery support.

- Coordinated **onboarding** plans, configuration inventories, decisions, and launch dependencies across customer projects.
- Validated multi module setup, data relationships, **analytics**, and rule based workflows during supervised implementations.
- Created customer training materials that simplified product concepts into repeatable administrator steps.
- Tracked **milestones** and decisions, escalating blockers with actionable context for delivery partners.
- Reviewed feedback and support patterns, improving documentation around recurring onboarding questions.
- Progressed into independent discovery and **coaching** through accurate remote project **operations**.

Customer Onboarding Specialist

October 2016 - September 2018

Northfield Business Software

Fort Collins, CO

Supported B2B software onboarding by gathering workflow requirements, organizing account configuration, validating customer inputs, and guiding administrators through initial adoption. Developed strong habits in scope control, milestone **communication**, troubleshooting, and continuous **process improvement**.

- Gathered workflow requirements and organized account configuration through initial customer adoption.

- Validated customer data and setup inputs before launch, reducing avoidable implementation rework.
- Conducted administrator walkthroughs that connected product behavior with customer operating processes.
- Maintained project records and milestone status across simultaneous engagements and deadlines.
- Routed product issues with reproducible steps and customer context for technical support.
- Improved checklists and preparation materials after reviewing recurring **onboarding** questions.

PROJECTS

Scalable Implementation Playbook 📅 2024

Created reusable discovery prompts, milestone guidance, configuration checks, and customer communication patterns for recurring SaaS implementation needs. Work supported consistent delivery across a high volume portfolio.

Customer Adoption Analytics Framework 📅 2023

Structured implementation cycle data, adoption signals, and recurring configuration questions into practical review themes. Insights helped guide process updates, coaching conversations, and launch readiness decisions.

LEADERSHIP & AWARDS

- Recognized by delivery leadership for dependable ownership across a portfolio of concurrent SaaS implementations.
- Selected as a trusted cross functional partner for clear customer communication and difficult configuration decisions.
- Earned expanded implementation responsibilities through consistent delivery quality and strong customer coaching.

EDUCATION

Bachelor of Science in Business Administration, Information Systems

2016

Colorado State University GPA: 0

Fort Collins, CO

Coursework: Information systems, project management, business analytics, database concepts

CERTIFICATIONS

- Certified Associate in Project Management 📅 2018
- Prosci Change Management Certification 📅 2022

TECHNICAL SKILLS

- **SaaS Platforms:** B2B SaaS, multi module SaaS, customer onboarding
- **Project Management:** Scope definition, milestone planning, dependency tracking
- **Data Structures:** Relational data, shared data models, configuration inventories
- **Workflow Configuration:** Conditional logic, workflow rules, shared configuration
- **Analytics:** Adoption signals, implementation metrics, cycle analysis
- **Change Management:** Prosci, change readiness, operating procedure adoption
- **Customer Enablement:** Administrator training, product walkthroughs, launch coaching
- **Communication Tools:** Remote communication, decision records, stakeholder updates
- **Delivery Operations:** Launch readiness, risk tracking, escalation management
- **Cross Functional Systems:** Customer Success, Sales, Product, Engineering
- **Process Improvement:** Templates, checklists, scalable guidance
- **Business Applications:** Customer workflows, operating models, business outcomes

SKILLS

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|---------------------------|---------------------|-------------------------|-----------------------|
| • B2B SaaS Implementation | • Multi Module SaaS | • Analytics | • Process Improvement |
| • Customer Onboarding | • Configuration | • Change Management | • Customer Success |
| • Project Management | • Relational Data | • Customer Enablement | • Metrics |
| • Mid Market Customers | • Conditional Logic | • Stakeholder Alignment | |

PROFESSIONAL AFFILIATIONS

- Project Management Institute, member since 2018.
- Prosci practitioner community, participant since 2022.

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST